

The Global Beauty Edit

Executive Brief

December 2025

Data to end Q3 2025

Strategic Beauty Guide for 2026 Fuse Beauty Performance, Consumer Sentiment and Seamless Commerce



The beauty industry enters 2026 with strong momentum. ***Global sales grew by 10 percent this past year***, fueled by vibrant creativity, cultural influence, and viral beauty moments that continue to captivate consumers. Shoppers are spending 6 percent more than in 2023, signaling resilience and appetite for indulgence.

At the same time, lifestyle shifts are reshaping routines while budgets are tightening. The duality of premium aspirations alongside pragmatic choices, creates an opportunity for brands to lead with agility and clarity of value.

Technology is amplifying this transformation; product recommendations are the second highest stated use of generative AI and ***49% of these consumers have taken Beauty product recommendations from AI***, moving from experimentation to execution, powering personalized diagnostics, virtual advisors, and creative content generation. Social platforms are turning trends into transactions, while omnichannel ecosystems blur the lines between physical and digital.

Looking ahead, ***as consumer balance their spending***, brands that embrace this convergence of performance, sentiment, and seamless commerce will find the next era of beauty promises to be dynamic, inclusive, and inspiring.

Tara James Taylor
SVP, Global Beauty

Trust in an AI Era: Building Confidence in a Noisy Market

As beauty enters a technology-driven future, trust remains the foundation of consumer choice. While sustainability and social impact matter, NIQ's global data shows that efficacy and transparency dominate trust-building:

58% of consumers cite product quality and consistency as the top influence on trust

Customer service responsiveness and local sourcing follow closely, while ethical and environmental practices rank as moderate influencers.

This underscores a critical truth: brands must lead with proof, not promises. In an age of algorithmic recommendations and virtual advisors, consumers want reassurance that technology enhances - not compromises - the integrity of their beauty experience.

Key considerations for Leaders:

- **Anchor trust in visible results, ingredient transparency, and clear claims.**
- **Use technology to validate performance, not just personalize marketing.**
- **Communicate how AI-driven processes uphold quality and safety standards.**

Trust is not static, it's earned daily through clarity, reliability, and authenticity across every touchpoint.

49% of consumers have taken *Beauty Products* recommendations from Gen AI

AI Moves from Curiosity to Utility

Artificial Intelligence is no longer experimental - it's becoming central to beauty strategy. Across the value chain, AI is driving transformation in four critical areas:

Smart Manufacturing

Smart manufacturing for real-time quality control and operational efficiency.

Personalized Diagnostics

Diagnostic tools that enable personalized skincare and shade matching.

Agentic Assistance

Agentic AI assistants to guide product selection, enhance customer service, and streamline inventory management.

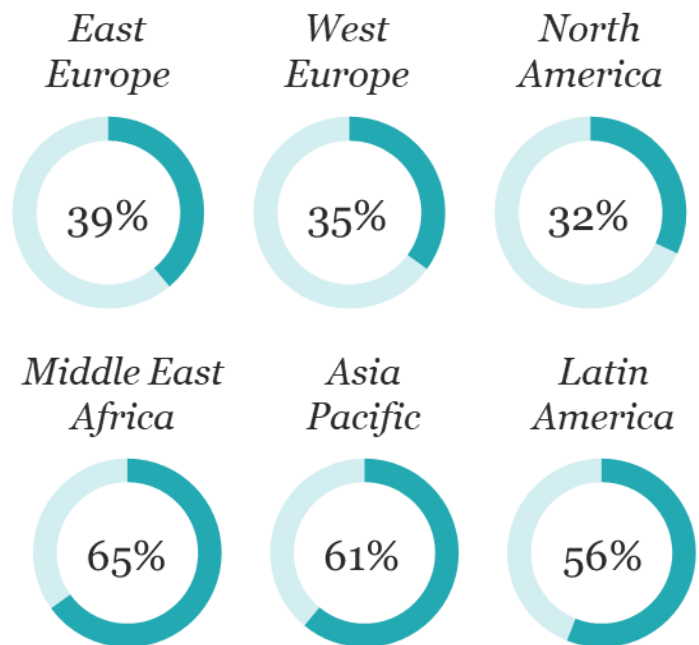
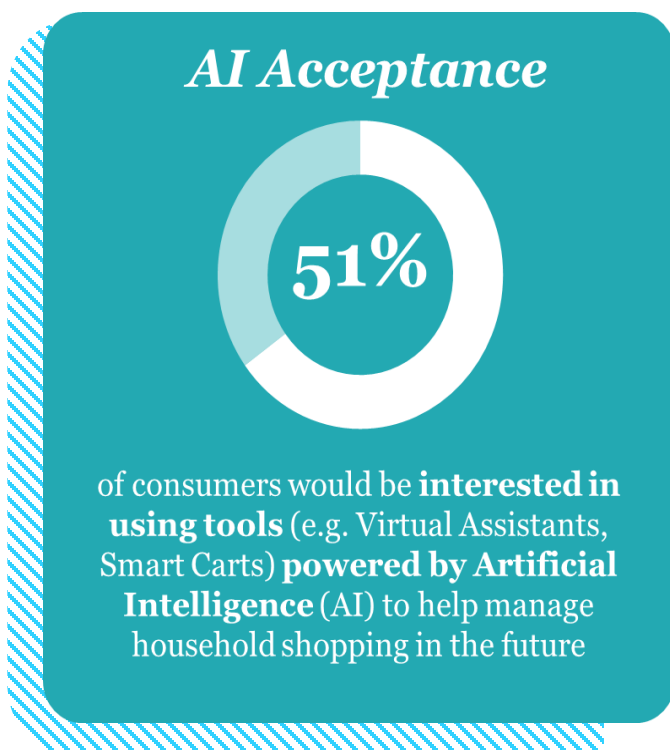
Generative Campaigns

Generative AI for creative content, campaign assets, and personalized recommendations.



Technology as a Strategic Growth Engine

Consumer adoption is rising but cautious as 51% of global shoppers express interest in AI-powered shopping tools. Only 40% are comfortable with automated purchase decisions, signaling the need for human oversight and transparency.



Brands should deploy AI as a tool to simplify discovery and enhance the consumer experience, rather than replace human judgment. The focus must be on creating intuitive, transparent solutions that deliver tangible benefits that consumers truly value. Such as personalized routines, streamlined shopping journeys, and improved service. Ultimately, AI should act as an enabler of trust and convenience, not a disruptor of confidence.

Trends to watch

Trends to Watch: Resetting Beauty for 2026 and Beyond

The New Beauty Landscape, Where Transformation Meets Opportunity

The beauty industry is entering a new phase of transformation driven by technology, cultural influence, and evolving consumer priorities. Shoppers are looking for more than products; they expect experiences that combine personalization, transparency, and well-being.

These trends highlight where growth will come from and how brands can respond with agility and confidence. From the rise of AI-powered solutions to the demand for radical simplicity and social commerce, each shift represents an opportunity to strengthen relevance and deliver meaningful value in a competitive market.

Beauty Tech Revolution

*AI, Neuroscience,
virtual try-ons*



Innovation Acceleration

*Short trend cycles,
dupes*



Male Beauty & Tweakments

*Redefining category
norms*



Beauty + Wellness Convergence

*Holistic, Mind &
Body*



Fragrance Renaissance

*Scent-driven
innovations*



Social Commerce & Virality

*TikTok Shop,
influencers*



Global Meets Local

*Cultural Beauty trends
from K-Beauty to
Ayurveda*



Premiumization vs. Affordability

*Value & efficacy vs
prestige*



Trends to watch

Innovation and Consumer Shifts Driving the Future of Beauty

Beauty Tech Revolution

*AI, Neuroscience,
virtual try-ons*



Beauty Tech Revolution

Artificial Intelligence is no longer experimental. It is embedded in every stage of the beauty value chain. Diagnostic tools, virtual try-ons, and generative content are driving personalization and speed to market. Smart factories are improving efficiency and quality control.

51%

of global consumers express interest in AI-powered shopping tools, signaling that digital intelligence is now an expectation rather than a novelty.

Premiumization vs. Affordability

*Value & efficacy vs
prestige*



Premiumization Meets Affordability

Economic polarization is shaping beauty choices. Some consumers are trading up for prestige experiences while others are prioritizing value and efficacy.

24%

plan to spend less on beauty products in 2026 while twenty percent plan to spend more, creating a dual-track market.

Winning brands will premiumize through performance, delivering visible results and emotional reward rather than relying on price alone.

Beauty + Wellness Convergence

*Holistic, Mind &
Body*



Beauty and Wellness Convergence

Consumers increasingly view beauty as part of holistic well-being. Mood-boosting body care, supplements, and psychodermatology are gaining traction. At-home devices replicate spa-level treatments and appeal to tech-savvy consumers.

55%

of Gen Z are willing to pay more for products that recreate out-of-home experiences, fueling demand for rituals that combine beauty and wellness.



Trends to watch

Cultural Forces and Commerce Trends Redefining Growth

Social Commerce and Virality

Platforms such as TikTok Shop are turning trends into transactions at unprecedented speed.



22%

of global consumers have purchased beauty directly through TikTok, making social commerce a critical growth engine.

Brands must master creator partnerships and algorithm-driven discoverability to remain relevant in this fast-moving landscape.

Cultural Influence and New Frontiers

Regional powerhouses are reshaping global beauty narratives. India's Ayurvedic heritage, China's technology-driven ecosystems, and Brazil's expertise in body care are setting new standards. Cultural fluency and local relevance will be essential for global expansion as consumers seek authenticity alongside innovation.

Radical Simplicity

Overconsumption concerns and cluttered routines are driving demand for streamlined solutions.



52%

of global consumers are willing to pay more for products that save time and reduce complexity, making multifunctional and time-saving products a cornerstone of future growth.

Ingredient Integrity

Transparency and science-backed formulations remain critical. Nearly half of consumers are willing to pay more for elevated ingredients and supply chain clarity, reinforcing the need for credible claims and clinical validation.



Entering 2026 with Confidence

Beauty is increasingly shaped by contrasting priorities, balancing premium indulgence with pragmatic value. Growth will depend on understanding these signals with precision and creating portfolios that flex across budgets while delivering credible efficacy. At the same time, the conversation around technology introduces a new dimension: what is real innovation and what is consumer-fueled hype. Artificial Intelligence is transforming the industry, but success will come from using it to enhance authenticity and trust rather than create confusion.

Human-centered design and cultural fluency remain essential as brands navigate this dynamic environment. Those that translate fast-moving signals into meaningful storytelling and timely innovation will not only keep pace but set the standard for the next era of beauty.

Invest in AI for personalization, diagnostics, and operational efficiency

Double down on social commerce and creator partnerships for discovery and conversion

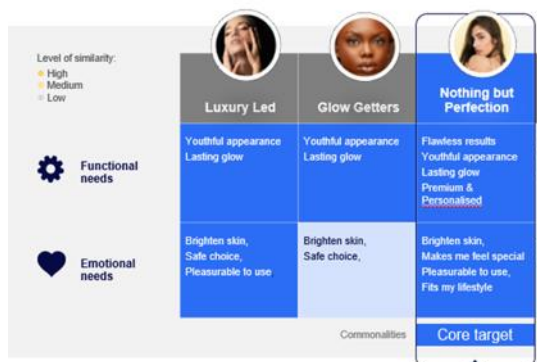
Localize strategies to capture cultural relevance and regional growth hotspots



Have you heard the news?

NIQ AI Solutions designed to help you win

NIQ can help you build winning strategies supported by the power of AI – learn more about AI Chat.



AI Chat from NIQ Growth Architect enables you to use the power of AI to interact with your identified target consumer growth segments

Our latest global Beauty reports are out!

Reach out to your NIQ contact to find out more about the Global Outlook for Beauty 2026 and find more Beauty intelligence through the Beauty Inner Circle



We'd love to hear your feedback!

Please help us shape future versions of *The Global Beauty Edit* by letting us know your thoughts and feedback via this quick survey

A pink gift box with a gold ribbon bow is the central focus. Above it is a silver disco ball reflecting light. To the right, a makeup palette with purple and pink shades is visible. The background is a light blue surface with shadows.

NIQ

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About NIQ

NIQ, the world's leading consumer intelligence company, reveals new pathways to growth for retailers and consumer goods manufacturers. With operations in more than 100 countries, NIQ delivers the most complete and clear understanding of consumer buying behavior through an advanced business intelligence platform with integrated predictive analytics. NIQ delivers the Full View.

NIQ was founded in 1923 and is an Advent International portfolio company. For more information, visit [NIQ.com](https://www.niq.com)